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ABSTRACT

This manual is intended to simplify the job of collection development and to give bibliographers access to the information they need to do their jobs. It emphasizes the procedures used for initiating orders in the libraries of Virginia Polytechnic University, and highlights sources of information that bibliographers can access in ordering. It is possible to use the manual, published in loose leaf format, as the basis for a compilation of information about collection development. The first section discusses gathering information, with information on patron groups, the use of the collection, and information about materials on order. A second section reviews selection tools, including the OCLC catalog. The third section reviews the ordering process for the university libraries. A final section discusses decisions that bibliographers must make and the decision policies of the university. Nine appendixes discuss particular aspects of collection development, including selection issues and collection management. Minutes of recent meetings of the university libraries collection development committee are included to illustrate how the bibliographer can use the manual as a place to keep all job relevant information. (SLD)

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BIBLIOGRAPHERS'

MANUAL

Virginia Tech University Libraries

Paul Metz
Principal Bibliographer

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1.0. PREFACE

The manual is intended to simplify the job of collection development and to give bibliographers access to the information they need to do their jobs. It emphasizes the procedures used for initiating orders in the University Libraries and the sources of information bibliographers can access in ordering. Because the various electronic systems available to bibliographers change so frequently, the manual simply describes their scope and content. I can provide more detailed documentation or tutorials to any bibliographer needing them.

If you choose to, you may use this manual almost like a loose leaf to keep up to date on collection development. By inserting directories of bibliographer assignments, lists and profiles for blanket orders, various policy handouts, and minutes of our monthly meetings, you could make this manual the sole reference for nearly everything you need to access about collection development.

Please let me know if you encounter errors or outdated information.

--Paul Metz
Principal Bibliographer

NOTE: To illustrate the use of the Manual as a single place to keep all major document related to collection development, sample pages of rosters of assignments, the approval plan profile, and recent minutes are included in this ERIC document. The manual is published as a three-ring notebook, with dividers and tabs for the major sections.

2.0. GATHERING INFORMATION

This chapter describes the means by which you can obtain the information needed to support informed selection. In order, it covers,

* information on the patron groups whose collections you build
* information on the use of our collections
* bibliographic, financial, and holdings information about collections in your area

Information on identifying and evaluating the available literature in your areas is given in the next chapter, "The Selection Process."

2.1. Information on Patron Groups

Information is provided in the Appendix for storing the documents described in this section.

2.1.1. Faculty Expertise Data Base

This data base provides information on the teaching and research interests, areas of expertise, and publications of those faculty members who have voluntarily submitted data. Participation has been highest in the scientific and applied fields, lowest in the humanities. Although the file is maintained online, many entries have not been updated since the 1988/89 academic year.

The Principal Bibliographer (PB) can lend you documentation on accessing the Faculty Expertise Data Base through the main frame. You should receive an annual printout of entries for faculty in your departments.

2.1.2. The University Catalogs

The university catalogs, and especially the graduate catalog, will indicate the degrees offered by your departments and the required or elective courses. Some entries provide useful narrative descriptions of disciplines and courses of study.

2.1.3. Departmental Profiles Project

Each bibliographer should have compiled the results of a Departmental Profiles Project conducted during 1990. Check with the PB if you need copies of any profile.

2.1.4. Departmental Publications

Some departments have remarkably informative publications about their programs and faculty.

2.1.5. Reserve Lists

By checking on the materials your department has put on Reserve, and especially on Permanent Reserve, you can learn more about its instructional emphases.

2.1.6. Personal Contacts

There are many other ways to keep track of ongoing developments in your departments. Attendance at departmental meetings or seminar series accentuates your availability while letting you know what's happening in a department. It's extremely useful to wangle an invitation to address your departments once a year (second fall meeting is good; first usually has too full an agenda) and review your roles in collection development, literature searching, bibliographic instruction, and advanced reference. Occasional memoranda to all departmental faculty about major new acquisitions, services, or collection development projects also serve to remind them that you are available and interested.

Getting on departmental mailing lists, giving library tours to new faculty, and watching Spectrum for announcements of faculty publications and lectures or for theses and dissertation defenses are all useful ways to monitor developments in your departments.

2.2. Information on Use of the Collection

The use of various parts of our collection has been studied on several occasions. The bibliography provided in the Appendix gives references (under Metz) to a 1982 study of circulation use and a 1987 study of circulation and in-house use. The PB can provide photocopies or offprints of these materials.

Whereas the published studies reported use according to subject, we have a number of internal reports giving data on use of specific titles. Data on the use of our journals were studied in 1990: current periodicals were studied in the spring, bound periodicals in the fall.

2.2.1. Tailored Reports

The Systems Operations Group can give you printouts of the VTLS items in any (manageable) call number range. Circulation counts are provided. And the PB will periodically obtain listings of all of books with high recent circulation. See the PB for the most recent version of this report.

2.3. Information on Materials on Order

There are a variety of ways you can obtain information on your or your colleagues' orders. Someday when cows fly this will all be available in one system. In the meantime, please check. . .

2.3.1. VTLS Information on Acquisitions

The VTLS online catalog gives limited but useful information about materials on order. By searching "Z/" and fund code acronym you can list the materials on firm order for any fund code.

For continuing orders, the MARC Holdings Screen, which is accessed by the "HM" tranverse command, provides useful information on the status and source of titles. Use the following legend in interpreting the displays in the fixed fields:

ACQ STAT:	1 -serial adds -Serials set up in Kardex with standing orders, gifts, free items and mailing lists 2 -ceased/dead titles without holdings gaps 4 -currently received 0 -non-current titles and unknown acq status -cancelled titles (NOTE that 1 & 4 are live titles, the others are not)
ACQ Method	d -deposit (state and US federaldocuments) e -exchange f -free g -gift p -purchased u -unknown
CANCEL:	uuuu -indicates cancellation of title
GEN RET:	4 -retained until replaced by microform 5 -retained until replaced by cumulative edition 6 -limited retention (other than described in 4 and 5) 8 -permanently retained

2.3.2. PO Register

The Purchase Order Register is an online file available on the mainframe through LIBINFO. It is searchable by author or title keyword, fund code, and date. Search arguments can be combined in an implicit boolean "and". Generally the set for orders against a fund code is too large to display and further precision is needed in the search. The PO Register will tell you when an order was placed, its fund code, and the date of receipt if it has come in.

Orders are available from the time of ordering until the annual purging of filled orders, or until an order is cancelled. See the PB for a demonstration or for documentation.

You should also receive a monthly printout from the PO Register file of all orders received against your accounts in the previous month. See the PB if you are not receiving this listing.

2.3.3. SCIORDS data base

Firm orders for materials in science and technology can be tracked through the online SCIORD data base. See any science bibliographer for a demonstration.

2.3.4. Serials payment information

By entering the "Serials" option on VM's LIBINFO facility, bibliographers can obtain several years' payment history record for continuations. Titles may be searched by keyword. Continuation fund codes (suffix 2 for subscriptions, 3 for standing orders) may also be searched. Contact the PB if you need an offline printout of your continuations records.

2.3.5. Fund Reports

Every week you should receive a printout reporting fiscal year encumbrances and expenditures to date from the library's materials budget. Each fund will have seven lines, as follows:

Line ending 00 is simply a header for the subject.

Line ending 10 reports firm orders. All books, videos, or other one-time publications you firm order will be reflected here. This includes any serial backsets. It also includes the first expenditure for a new serial or other continuation.

Line ending 11 is for a tracking account, which may be used to distinguish a particular class of publication or subject within the fund. For example, women's studies materials are charged to the sociology tracking account (SOC1), and Appalachian studies are charged to the history tracking line. A tracking line may be established with the approval of the PB, who will alert Business Services and Acquisitions to its existence and help you allocate funds for the line.

Line ending 20 is for subscriptions charged to your account.

Line ending 30 is for standing orders charged to your account.

Line ending 40 is for approval books charged to your account. This includes both the books you sign for at Friday review and any approval plan materials you order from the vendor's slips.

Line ending 50 is for blanket orders charged to your account.

Note that at any point in the year all lines except the 10 and 11 lines will be 100 percent spent. This is because funds are not allocated to these lines except as part of the expenditure process. Funds are held in holding accounts reported at the end of the budget report and shifted to individual fund lines only as they are spent.

Allocations are made at the beginning of the year to the firm order lines (suffixes 10 and 11). Each order creates an encumbrance, which reserves funds for a future expenditure. Its dollar amount is reflected in your encumbrance line until the order is filled and paid, at which point the actual dollar amount (as opposed to the encumbrance estimate) is expended and the encumbrance is removed. The obligation column represents the sum of encumbrances and expenditures to date for any line.

Note that the budget printout reports both expenditures and obligations to date as a percentage of total allocation. Percentage of outstanding encumbrances is not reported, but would be the difference between these amounts. Note also that the column labelled "unexp balance" reports funds not actually spent. The column labelled "available funds" reports the more important sum, funds neither expended nor encumbered.

Each year you should receive a memorandum establishing target percentage levels of expenditure and obligation at quarterly intervals of the fiscal year. The intent of this memorandum is to help you spend all your funds without going over and to help you and technical services avoid peaks and valleys in work flow. In actual practice all funds cannot be spent, nor an even workflow maintained, without overencumbering at the end of the year. The annual memorandum will establish a target level for overencumbrances, which will be reflected in the obligation column.

In addition to monitoring the materials budget reports, it is important that you communicate regularly with your searcher. Any backlog of orders not yet processed by your searcher represents a lien on your budget line which you should consider in future ordering, but will not be reflected in the budget printout. It is sometimes advisable, when a searcher has a large backlog, for a bibliographer to review his or her old orders and winnow them.

3.0. SELECTION TOOLS

3.1. Alerting Tools

There are many means by which you can be apprised of new publications. Most bibliographers are on the routing list for either The Weekly Record, a current weekly listing of American imprints arranged by main entry, or The American Book Publishing Record, which cumulates the same information on a monthly basis and arranges entries by Dewey number. Both tools are nearly comprehensive for American trade publications, but spotty for society or other specialized publishers. Only basic cataloging information is provided. See the PB to get on a routing list for either publication.

Slips are provided by Ballen for titles that are within our profile but for which books are not automatically sent, and by a number of other vendors. See the PB if you are not receiving slips in your area.

"Junk mail" and publishers' catalogs comprise the final kind of alerting tool. See the PB if you aren't getting your fair share!

3.2. Early Review Tools

The New York Times Book Review is used by a number of bibliographers because it provides timely and thoughtful reviews of new and important domestic books. Choice magazine, subtitled Books for College Libraries, also provides fairly timely reviews of books considered appropriate for academic libraries. Each of these periodicals publishes "best" lists, the Times cumulating its lists in June and December, Choice in May. See the PB to have your name added to these routing lists.

3.3. Delayed Reviews

If is often useful to identify and use one or more scholarly journals providing reviews in your subject fields. Annual literature reviews in your discipline are also useful in identifying titles, as well as for their descriptions of new developments in the field.

3.4. OCLC

OCLC is useful, less for identifying titles than for determining their actual availability. The "DHA" (display holdings all) command will help you tell how many other libraries have already obtained a book.

3.5. Faculty and other patron requests

Suggestions to purchase materials will come to you directly from your departments or indirectly through the suggestion box or the electronic "booksugg" facility on the INFO system. Generally it's possible to accommodate most of these, especially faculty requests. "Notifies" are usually placed with such orders, although it's occasionally necessary to contact a faculty member who sends many requests to sort out whether he/she really wants notifies or is simply forwarding suggestions.

4.0. THE ORDERING PROCESS

Any order you initiate will ultimately affect the work flow of several departments. This section is intended to help you make sure your order is handled the way you intend and to help you furnish the information others require.

4.1. Communicating Your Instructions

In conveying an order to your searcher, the minimum information required is your initials and correct fund code. Most orders will be from your firm order account, which has no suffix. This includes monographic orders, videos, and any serial backsets. Use the 2 suffix for new subscriptions and the 3 suffix for new standing orders. The 4 suffix should be used for approval plan books.

Beyond this basic information, there are many kinds of information you may optionally wish to convey. These include:

4.1.1. Rush

Books may be ordered rush if they are needed urgently or are apt to become unavailable soon. Most rush orders are on behalf of a patron with an immediate need, and these should be designated "rush order, rush catalog." Note that rush cataloging is not automatically assumed for rush orders, and must be specified.

Note that rush orders produce extra work throughout Technical Services, slowing down the processing of routine orders. Please use discretion in designating orders "rush."

4.1.2. Notifies

If you are buying material for a specific person or want someone to be notified when materials are available, you may designate "Notify (name)" on your order. Please furnish address, including four-digit building code, if possible. If a book is bought in soft cover, it will be made available to the patron first, and bound upon return to Circulation.

Bibliographers occasionally have themselves notified of materials they want to inspect, usually to determine whether to place in Reference or Noncirculating status. You would generally see your orders on Friday review, but notifying yourself is an option if you want to be sure.

Orders are sometimes generated from stack search printouts which indicate that there are existing holds or recalls for a book. By designating "Notify Hold-Recall Clerk" you can see to it that received materials will be sent to Circulation so that the patron who has been seeking the title will be notified.

4.1.3. Duplication and specific editions

It is critical that you work out with your searcher a consistent and unambiguous means of communicating about possible duplication. One possibility is for your searcher to be asked to ignore all orders which would duplicate our collection or existing orders unless you have noted "intentional duplication." It's similarly important that your searcher know when you want a specific edition, and want the material even if an earlier edition is held. Here again you simply need to agree with your searcher about how your wishes will be conveyed.

4.1.4. Discarding and Relocating Older Materials

If you are ordering a newer edition of an existing work, you may designate your instructions for the existing edition on your order. "Discard previous edition (call number)" or "Retire previous edition (call number) to stacks" are examples of such designations.

4.1.5. Paperback vs. Hard Cover

Many books are published simultaneously in hard and soft cover. The default for the library is hard cover, but you are free to override this and specify that you want the paper edition. The paper edition will then be purchased and sent to our commercial bindery for binding at the high standards of library binding. While this adds a month or more delay to the book's availability, it can significantly reduce the library's costs and will almost always result in a substantially more durable binding than the publisher would have provided in hard cover.

4.1.6. Reference Room or Non-circulating

You may designate at the time of ordering that materials are to be housed in the Reference Room or in Science Reference. Another option sometimes used for bibliographies or lesser-used reference materials is to designate "Noncirculating" status. Such books will be shelved in the stacks but will not circulate except by special permission.

4.1.7. Branch location

In the absence of contrary instructions, materials will be located in Newman or branches according to their call numbers. By default, all QE's shelve in Geology, all N's except NX in Art and Architecture, and all SF600-SF1100 in Vet Med. Books ordered by the Northern Virginia Librarian are housed at NVGC. A bibliographer may specify a location other than that determined by call number at the point of ordering. The simple specification "catalog for Newman" or "catalog for Art and Architecture" is all that is required.

4.2. Co-signatures and Consultation

The Head of the Reference Department should be notified in advance of any multi-volume set being purchased for a reference location. The Microforms Librarian must always be notified when microforms are ordered, so that he or she can plan for cabinet space. For expensive purchases, a co-signature is required: the PB signs for orders between $300 and $1,000; the Assistant Director for Public Services and Collection Development signs for orders over $1,000, or for smaller orders when the PB is unavailable.

4.3. Signing or Cancelling Orders

Your orders will come back to you for final signature. While this is often pro forma, you should check to make sure the price (which was probably an estimate when you first placed the order) does not exceed what you are willing to pay. Also check the call number area for "NED" or "ADC," which indicate new editions or added copies you may or may not have realized you were ordering.

If the price is unreasonable or you discover that the material would have been an unwanted duplicate, you should send the order back to your searcher unsigned with instructions to cancel. Otherwise the title will remain in VTLS and will display as "on order" indefinitely.

4.4. New Continuations

All new continuations, whether standing orders, subscriptions, or blanket orders, require the co-signature of the PB. Since all orders processed by the searchers become "on order" in VTLS, it would be premature to ask your searcher to enter a continuation order that had not been approved.

To request a new continuation, place an OCLC printout including holdings information if available in the "black box" in the Director's Suite. Since the OCLC information on price and the indexing services covering a title is generally stale, it's good to look this information up in Ulrich's and write it on the printout. Any flyers or notes of explanation you wish to attach are welcome. The PB will periodically convene subject teams to evaluate new continuations in light of available funds. Approved continuations should then be processed as new orders. Use the "2" or "3" suffix for your order and ask your searcher to obtain the PB's co-signature.

4.5. Exceptional Means of Ordering

4.5.1. Faculty buying trips

We cannot reimburse faculty members for their expenditures on our behalf while on their travels, and it would be a discourtesy to encourage such trips. If a faculty member consults with you in advance and is able to bring back a modest amount of material you want for the collection, along with an invoice for direct reimbursement of the vendor, this can be accommodated. Please see the PB before authorizing any such arrangement.

4.5.2. Trials on Approval

Purchasing materials "on approval" is generally more trouble than it's worth. However, there are exceptions, the most frequent kind occuring when faculty members have obtained a videotape on approval, have liked it, and have requested that the library obtain it. Since our collection development assignments represent subjects rather than formats, such materials would become your order if in your field and if you find them desirable.

The Acquisitions Department can accommodate such orders if your searcher works up an order and the library order, the video or other material itself, and the vendor invoice come to Acquisitions together. A typical "invoice" in such cases is a letter specifying that the user must return or pay for the material within a given time frame.

4.5.3. Ordering "direct"

Our state-approved purchase contracts oblige us to use a set of specified vendors whenever possible. There will be occasions however, when you have reason to request that materials be ordered direct from a specified source. These include rush orders for materials available from a publisher or book store; out-of-print materials whose availability from a specific source you have identified; and materials our jobbers have said are unavailable but which you have taken the trouble to identify as available from the publisher. In such cases you are entitled to specify "order direct," giving the source and the rationale for the direct order.

4.5.4. "Claiming on Approval"

You may occasionally want to order a book published by a press on our approval plan. Since either books or slips should come for virtually all such titles, it is best to avoid placing this extra work load on technical services staff. One exceptional circumstance warranting such orders does, however occur with faculty requests for a title, with notification to the requestor. This can be accomplished only by contacting the Ordering Supervisor and asking that the book be ordered from your "4" suffix account, with a notify to the requestor. Our approval plan vendor will send the book with a note triggering the notification process.

4.5.5. Missing Pages

It is library policy to replace missing pages as they are encountered, with the following exceptions: general interest magazines (AP's); titles backed up in microformat; government documents; and loose-leaf titles. To begin the replacement process, you need only send the damaged issue and a note identifying the missing pages to the Binding Unit. Fees will be paid from a general part of the materials budget.

4.5.6. Gaps

Gaps (entire issues lost or never received) are treated automatically, from a bibliographer's point of view. However, you may be asked to firm order issues costing more than a threshold price (currently $50). The intent of this rule is to make such expensive items compete with the other materials you might buy, and not be purchased automatically.

5.0. DECISION SHELVES -- "FRIDAY REVIEW"

"Friday Review," which is generally ready for you from mid-day Thursday through Friday afternoon, is a hallowed tradition. While not catching up on the latest library gossip or picking out some good reading for home, you will probably have to make a few decisions. Here's how to get through them quickly so you can return to the main business at hand.

5.1. Approval Books

Books from Ballen will be arranged by large call number groups. These are our automatic receipts from the university press (and selected others) approval plan. The form inside each book indicates its class number, and in determining which bibliographer is responsible for an approval book we follow the bibliographers' call number assignments much more literally than usual. To sign for a book, simply put your initials and fund code with "4" suffix (e.g. pdm-soc4) in the upper right hand corner of the slip. You have the option to return an approval book. Your initials and reason for return should be indicated.

If you want to assign a location or place a notify slip in an approval book, you may do so by following the procedures outlined in 5.4 below.

After finishing a book, please turn it spine up so that other bibliographers will know it has been handled. Please ask another bibliographer or the PB to check your approval shelves if you will not be available for weekly review. The best way to sign for another's books is to indicate both initials, e.g. "lbr for pdm-soc4."

5.2. Government Documents

Every few weeks you should check the Government Documents decision shelf to find books initialed for your decision. Your choices are "retain in SuDocs" or "catalog in SuDocs." The latter decision will result in full descriptive and subject cataloging in VTLS. Consult with the PB in the unusual instance where you may wish to have a government monograph cataloged in LC so that it can shelve with related materials.

5.3. Weeding Shelves

If there are weeding projects underway, there should be shelves where bibliographers can review their colleagues' discards. Any bibliographer has a potential stake in any discard, and all such review shelves will provide forms you can use to have a discard decision reconsidered.

5.4. New Materials

Newly received books from firm orders, gifts, and standing orders will be arrayed for review each week. The current week and next week are on opposite sides of a single range, and alternate each week. Review of new receipts allows you an opportunity to review your colleagues' selections and to become aware of gaps or weaknesses in the collection.

In reviewing new books, you may see materials you would like to designate for a reference location, for a branch, for non-circulating status, or for rush cataloging. Flags are available to be inserted in books and accomplish these purposes. Check with the bibliographer who originally ordered the material if you are assigning material to a library other than its original destination or if there is any possibility that he or she may not agree with the designation you want to assign.

Green notify slips may be completed and inserted in materials at this point to effect the notification of interested patrons.

5.5. Personal Review Shelves

Each week you should review the shelf with your name on it to make decisions about a variety of materials. Materials are sorted for these shelves by staff from several departments, who use their best judgment in following subject guidelines. It's fine to shift materials to a more appropriate bibliographer's shelf, just as you would readdress a misdirected flyer.

5.5.1. Gift Books

Gift books will contain yellow forms on which you can designate your decision. Your options include outright acceptance, outright rejection, or acceptance contingent on later determination of the number of copies or existence in the collection of specific editions of the work. Most bibliographers make an outright decision to accept or reject after checking the nearby VTLS terminal.

If you choose to reject the material, designate this decision, add initials and date, and place the material on the shelf labelled "Gifts to be discarded." For outright or contingent acceptances, indicate decision, initials, and date and remove the material to the next week's new materials shelf.

5.5.2. Damaged Materials

Damaged books with white decision forms will be placed on your review shelf. You may choose to withdraw these. Note that if you plan to replace the withdrawn material, you must initiate this as a separate process: replacement will not ensue from your simply checking "I do plan to replace."

Phase housing or retention in the Brittle Books Storage Area are other options. Phase housing is not cheap, but is occasionally appropriate for moderately damanged items with no special value as "rare." Brittle books storage protects severely damaged or highly valuable materials but makes them harder to find. Neither books in Brittle Books nor those in phase boxes circulate. After indicating your decision for a damaged book, place it on the shelf marked "Damaged Book Decisions."

On rare occasions, you may decide that the book has no special value beyond whatever circulating use it may still yield. In these cases, the appropriate option is discretely to reshelve the book and hope it never returns to your decision shelf. We are working to

5.5.3. Continuations Decisions

Periodicals or other continuations with decision slips will appear on your review shelf. The great majority of these are ephemeral materials received because of our many mailing lists or unsolicited sample issues of new periodicals. You will probably discard nearly all of them.

If you see a title you may want to subscribe to or a free publication you may want to establish in kardex and have retained, but you are not sure, you may designate "discard to (your name)." After several months you should decide whether the publication's quality or regularity of receipt justifies an order or a retention decision.

If you see a title for which you want to place a subscription, you may check "Keep, will place Subs/SO." This indicates your intention to place a new subscription, but actually doing so will necessitate that you take the steps described in section 4.4. Rather than establish the title in kardex right away, the Serials Receiving staff will hold it for several months and see whether your order is approved.

An additional option, "Keep, Subs/SO not wanted," will cause the material to be received and cataloged as a monograph or similar unique publication, without affecting the routing of future materials or causing kardex to establish an entry.

There is a shelf labelled "Answers to all kardex inquiries, regardless of decision," to which all continuations and their decision slips should be returned.

Areas of Contact Between Collection Development In Special Collections and in the General Collection

BOOKS

Listed below are several "special collections" in the Special Collections Department. These are areas in which materials in the general collection and Special Collections should support each other. The general collection should collect in as comprehensive a manner as possible current and retrospective scholarly books, reprints, reference works, and periodicals, with early, rare, and small-press publications collected by Special Collections. Grey areas--areas of overlap--are noted below.

Civil War. At present, we are actively collecting Civil War manuscripts, though we are not actively collecting Civil War books because one, possibly two, large Civil War collections have been bequeathed to us. The E. E. Billings collection is a rare book and manuscript collection with strengths in Union regimental histories and small-press publications. It also contains a large number of scholarly publications on the Civil War. The Homer Davis collection contains scholarly books from the 1950s to the early 1980s. When these collections come to us, we will have a fairly comprehensive collection of Civil War materials. Many of the non-rare books will duplicate circulating copies in the stacks. The two collections will in effect create a combination rare book, scholarly book, and reference collection in Special Collections.

History of Technology. We actively collect 18th and 19th century imprints in all areas of the history of technology. We also have strong manuscript collections in railroad history (the Norfolk and Western Railway and Southern Railway archival collections) and in aerospace history (the Archives of American Aerospace Exploration).

Sherwood Anderson. We have one of the top Anderson collections in the world, most of which is of interest largely to bibliographers. The collection includes various printings and editions of Anderson's works (including ephemeral publications), but includes no books about Anderson.

Appalachian History and Culture. We are really just beginning to collect Appalachian materials (as opposed to materials on Southwest Virginia). We collect early works and small-press and locally published books. In the area of Southwest Virginia, we try to collect everything that's published. There should be some duplication between Special Collections and the general collection--especially on the topic of Southwest Virginia, where there will be a lot of duplication.

Heraldry. We are building on the Harry Temple heraldry collection by filling gaps in older materials and in purchasing newer scholarly and reference works. Since this is such a specialized area, I see no need for much duplication between the general collection and Special Collections. Perhaps only the most basic reference works and general books on heraldry need be purchased for the general collection.

Women Architects. In addition to collecting the personal papers of women architects, the International Archive of Women in Architecture comprehensively collects books on women architects worldwide. There should be duplication between our collection in this area and the collection of the Art and Architecture Library, except for rare and expensive books that are only in Special Collections.

UNIVERSITY ARCHIVES

Faculty Books. We ask for donations of signed books by Virginia Tech faculty. If the faculty member says he/she is unable to donate a copy but agrees to sign a purchased copy, we will buy one. This faculty book collection is kept on open shelves in our reading room. Individual bibliographers should contact John Straw if they know of new faculty books; John also contacts bibliographers if he knows of them. In this area there should be almost total duplication between the stacks and Special Collections.

Virginia Tech Publications. We receive two copies of (theoretically) all Virginia Tech publications. Most of these are ephemeral in nature and go in vertical files in Special Collections. Major publications are cataloged, one copy for Special Collections, one for the open stacks. If bibliographers receive copies of Tech publications as gifts, they should let John Straw know about them to make sure we have copies. If for some reason only one copy of a Tech publication can be obtained, that copy should come to Special Collections.

Conference Proceedings of Conferences Held at Tech or Sponsored by Tech Departments or Centers. While not officially Virginia Tech publications, such conference proceedings are within the scope of the University Archives. If bibliographers are given copies of such conference proceedings, they should let John Straw know. We will try to get two copies--one for Special Collections and one for the general collection.

Glenn McMullen, July 9, 1990

Criteria for Evaluation of Collection Development Activities

Bibliographers will be evaluated on the extent to which they fulfill the following ideals.

Awareness and Support

Bibliographers should maintain open and supportive relationships with their assigned university clientele. They should strive to understand the main areas of teaching, research, and extension emphasis within their assigned units and to be alert to new programs and research interests. They should alert their clients to new library resources and services of potential use to their programs.

Selection

Bibliographers should understand the main traditions, topics, and techniques of their assigned disciplines and the structure of the literatures which report progress in their fields. They should be sensitive to new disciplinary developments. Their selection of library materials should serve primarily to represent the literatures of their assigned disciplines to present and future readers throughout the university community, and secondarily to support the related interests of their clientele.

Bibliographers should use an appropriate mixture of alerting tools and review mechanisms so as to acquire both current materials and those identified as valuable for the long term. They should recognize that different needs may justify acquisition in a variety of physical formats, or indeed the substitution of access for ownership. Selection decisions should reflect informed judgment about the strengths, weaknesses, and redundancies of the existing collection.

Ongoing maintenance of the collections and special projects in deselection and review should be pursued with the same goals as motivate current selection.

Library Programs and Procedures

Successful bibliographers draw effectively on the efforts of their colleagues, while making their own contributions to group effort. To this end, bibliographers should refer requests to their colleagues' attention when appropriate, and should respond cooperatively to referrals. Bibliographers should be able to specify and justify their budgetary needs, and to spend allocated funds at a regular pace.

Bibliographers should contribute to a high level of cooperation and joint effort within their subject teams and among all bibliographers. Their decisions about selection, cataloging, and retention should consider the needs and resources of their colleagues in technical services.

General Guidelines for the Selection of Interdisciplinary and Reference Materials

The responsibility for selecting interdisciplinary materials and reference materials can be very ambiguous. It is particularly important that bibliographers consult with one another about selection in these areas. Although each subject team will approach this problem somewhat differently, and although no rules could substitute for consultation among bibliographers, the following guidelines may help bibliographers to identify responsibilities for collection development in these areas.

Selection by Individual Bibliographers

Individual bibliographers should routinely select reference materials in their individual areas. Need for and perceived quality of materials are the relevant standards, as always. Materials for reference locations or noncirculating status are selected along the same lines as govern collection development responsibilities for other materials.

Bibliographers should informally negotiate among themselves the responsibility for selection in areas which fall into two or more disciplines.

Selection from the Reference Funds

The bibliographers responsible for the two reference area funds will be responsible for selecting most materials in the ready reference areas, for general sets such as encyclopedias, and for acquiring selected basic sets within the reference areas proper. They will consult with their colleagues about building the reference collections and will alert them to new reference tools in their respective areas.

Selection from the Interdisciplinary Funds

The bibliographers responsible for the interdisciplinary funds will consult with their colleagues about the selection of major reference sets spanning disciplines within the major subject area of the team or expensive or irregular sets representing individual disciplines. Teams may collectively elect other interdisciplinary uses for these funds, such as the completion of large retrospective sets. The bibliographer responsible for each team will seek consensus on requests to the Assistant Director for the use of his or her contingency fund for expensive materials which would otherwise have been purchased by the team.

In consultation with team members, bibliographers responsible for interdisciplinary funds will selectively acquire monographs and other materials spanning the research tradition of the team (works dealing with research throughout the humanities, for example), or covering fields which fall within the tradition but which are outside the curriculum at Virginia Tech.

Select Bibliography of Materials on Collection Development

Books

Arthur Curley and Dorothy Broderick, Building Library Collections (Metuchen NJ: Scarecrow, 1985). Z687 C87 1985

Patrick A. McClung, ed., Selection of Library Materials in the Humanities, Social Sciences, and Sciences (Chicago: ALA, 1985). Z689 S354 1985

William McPheron, ed., English and American Literature: Sources and Strategies for Collection Development (Chicago: ALA, 1987). Z674 A75 no. 45

Rose Mary Magrill and Doralyn J. Hickey, Acquisitions Management and Collection Development in Libraries (Chicago: ALA, 1984). Z689 M19 1984

Paul Metz, The Landscape of Literatures: Use of Subject Collections in a University Library (Chicago: ALA, 1983). Z674 A75 no. 43

Beth J. Shapiro and John Whaley, eds., Selection of Library Materials in Applied and Interdiscipinary Fields (Chicago: ALA, 1987). Z689 S353 1987

Robert D. Stueart and George B. Miller, Jr., Collection Development in Libraries: A Treatise (Greenwich, Conn.: JAI, 1980). Z687 C64

Articles

Ross Atkinson, "Old Forms, New Forms: The Challenge of Collection Development," College & Research Libraries 50 (September 1989): 507-20.

James A. Cogswell, "The Organization of Collection Development Functions in Academic Research Libraries," Journal of Academic Librarianship 13 (November 1987): 268-77.

Anthony W. Ferguson, Joan Grant, and Joe. S. Rutstein, "The RLG Conspectus: Its Uses and Benefits," College & Research Libraries 49 (May 1988): 197-206.

Paul Metz and Bela Foltin, Jr., "The Social History of Madness -- or, Who's Buying This Round? Anticipating and Avoiding Gaps in Collection Development," College & Research Libraries 51 (January 1990): 33-39.

Paul Metz and Charles A. Litchfield, "Measuring Collections Use at Virginia Tech," College & Research Libraries 49 (November 1988): 501-13.

David G. Null, "Robbing Peter. . . Balancing Collection Development and Reference Responsibilities," College & Research Libraries 49 (September 1988): 448-52.

John Rutledge and Luke Swindler, "The Selection Decision: Defining Criteria and Establishing Priorities," College and Research Libraries 48 (March 1987): 123-31.

George Saap and Peter G. Watson, "Library-Faculty Relations During a Period of Journal Cancellations," Journal of Academic Librarianship 15 (November 1989): 285-89.

Charles A. Schwartz, "Book Selection, Collection Development, and Bounded Rationality," College & Research Libraries 50 (May 1989): 328-43.

Collection Management for Academic Departments/Subject Disciplines

1. Learn about the characteristics of the subject discipline in general.
2. Learn about present trends and new directions in the discipline.
3. Learn about the existing literature and bibliographic characteristics of the discipline.
4. Learn about your assigned subject department's particular activities in the subject discipline.
5. Learn about other general important subject areas of interest to your assigned department.
6. Learn about other departments' interest in your assigned subject discipline.
7. Develop competencies for the evaluation of the library's collection in the subject area(s), including comparative analysis with the "great" collections in the subject area.
8. Monitor newly published materials in the subject discipline(s).
9. Develop collection management strategies for the subject(s)/discipline(s), including: criteria for priorities in purchasing, criteria for budget allocation, retrospective collection development, storage, deselection, and preservation.
10. Select materials in the subject(s).
11. Monitor the budget.
12. Liaison with the faculty.
13. Participate in special projects, committees, etc., as needed.

The Functions of the Academic and Library Faculty Liaisons

The primary function of the liaison relationship is to enhance mutual and timely information exchange between the academic departments and the library and to see to it that, on a day-to-day basis, the library needs of departmental faculty are satisfied.

The function of the librarian is;

1. To act as a library resource person to the department concerning all library services, but especially in the areas of collection development, bibliographic instruction, online database searching, and reference.

2. To inform the departmental representative of new developments in library services and collection development.

3. To be familiar with the teaching and research done in the department. To learn about future plans and directions for the department.

4. To receive and see to it that faculty requests for library materials are processed.

5. To convey to the Assistant Director of Libraries for Public Services and Collection Development the departments' concerns, needs, and suggestions; and to keep him informed about departmental matters, especially as they may relate to library services and collection development.

The function of the faculty liaison is;

1. To handle requests for library materials from departmental faculty.

2. To help the librarian in assessing the present and future library needs of the department.

3. To alert the librarian to new directions the department may be planning to take, in terms of teaching, research, and degree programs.

4. To disseminate information about the library to the department's faculty.

5. To gather concerns, needs, and suggestions from faculty and convey them to the librarian liaison to the department.

August 1989

Re-Selection and De-Selection Project

I. **CHEDS**

II. **NEWMAN**

A. Items not in VTLS

B. Duplicate copies

1. Monographs

Shelf list Stacks	Withdraw on the basis of circulation frequency or lack thereof.

2. S.O.s and journals

Check all duplicate continuations cancelled during past 2 years; make sure that the back runs are withdrawn. Fill in remaining copy, if needed.

C. Superceded volumes (continuations)
Some annuals and such may be only selectively retained; check for availability elsewhere in Virginia.

D. Superceded editions (monographs)
Latest edition or selective retention; check for availability elsewhere in Virginia.

E. Superceded works. Check for availability elsewhere in Virginia.

F. Item was available, but has not circulated for the past 3 years.
Check for availability elsewhere in Virginia.

G. Periodical back runs on microform.
Assess current duplication on microform and derive criteria for further conversion to microform.

THINGS TO CONSIDER IN THE PROCESS OF RE-SELECTION

1. Does item still contribute significantly to the corpus of knowledge? Does it have historical significance?
2. How much is item used or not used.
3. Is item readily available elsewhere through ILL?
4. Are there better works that cover the same subject area?
5 How much space does item occupy versus its aggregate usefulness as per above?
6. Is space saving substitute, such as microforms, available?
7. If item needs to be retained, is it acceptable to move it to CHEDS?

revised 8/89

Appendix H

Target Percentages for the Expenditure of the Firm Order Budget

Status of Fund Expressed as Percentage of Allocations

Fund Status	Beginning				Ending
F/O	July 1	Oct 1	Jan 1	Apr 1	Jun 15
Encumbrance	30%	30%	30%	30%	30%
Expenditures	0	25%	50%	75%	100%
Obligation	30%	55%	80%	105%	130%

NOTE:

I recommend that bibliographers calculate weekly quotas of orders for each of their fund codes in terms of dollar amounts that would encumber and expend the budget within the guidelines given above. Obviously, adherence to these guidelines is particularly important towards the end of the FY.

10/7/90

THE SELECTION AND TREATMENT OF EROTIC OR OTHER CONTROVERSIAL MATERIALS IN THE UNIVERSITY LIBRARIES

The University Libraries acquire each year a small percentage of the world's volume of publications. In selecting materials for inclusion in our collections, we attempt first to acquire those items which relate to university programs and hence will support the university's goals in research, instruction, and service.

Beyond this, we attempt to represent to some degree the entire span of humanity's cultural heritage. Disciplines and languages not taught at the university are represented selectively. The entire range of human cultural practice, of science and pseudo-science, and of religious, political, ethnic, and social expression is welcome in our collections insofar as representative materials may be acquired with scarce resources. To build our collections with any other goal in mind would be to ignore both the root and the deeper meaning of the term "university."

While we do not acquire materials purely for their prurient interest, our selection practices necessarily recognize that eroticism is often an integral part of many forms of cultural expression and that human sexuality is an important area of study for both the biological and social sciences.

Once any library materials have been acquired, our concern is to make them available to as many patrons as may want them. As educators in a democracy, we must have faith in our patrons to identify and select those materials most beneficial to their purposes. We are entirely in accord with the principles of intellectual freedom expressed in the American Library Association's "Library Bill of Rights" and supporting documents in chapter 53 of the ALA Policy Manual, including the rejection of practices denying or restricting access to materials or labelling materials.

Common sense and our own practical experience have indicated that theft and mutilation of library materials dealing with sexuality is common. For this reason, we have chosen to place on Reserve some materials deemed to be at risk. Here they may be protected from theft and damage, along with a variety of other, nonerotic materials which have been found to be vulnerable to theft and mutilation.

Quick Guide to Ballen Profile, 1993

Publishers:

* Books come automatically from U.S. university presses. Some subsidiary bodies (East-West Center of U. Hawaii, Harvard Business School Press, Belknap) also generate books, and some others generate forms.

* Books come from the following foreign universities: Cambridge, Oxford/Clarendon, Alberta, British Columbia, McGill, Toronto.

Slips come for books from most other relevant university presses, including Aberdeen, Australia, Edinburgh, Leicester, Open University, Tokyo, and U. Press of Ireland.

* Books come from the following private presses:

Basic Books	Hoover Institute	St. Martin's
Brookings Institute	ILR	Sci. American
Business One Irwin	Alfred Knopf	Transaction
Free Press	Princeton Architectural	Wiley Intersci.
	Russell Sage Foundation	

Subjects:

No subject is excluded altogether, and the great majority generate automatic books. Subjects for which decision slips are generated include all of law, local government (JS), specific educational institutions (LD), and scattered areas within medicine, including environmental health, geriatrics, plastic surgery, optometry, obstetrics, and chirporactic. Most other "slip only" subjects are in popularly oriented subjects such as leisure, parapsychology, fishing, cookery, and religious tracts.

Non-Subject Parameters:

Only a few very marginal kinds of books, such as study guides or abridgements, are excluded altogether. Slips are generated for textbooks, dissertations, coffee table and other popular treatments, travel guides, symposia, catalogs, and reprints. We do receive books for translations.

We get slips for individual volumes costing over $100 or sets costing over $500. We receive books for volumes in unnumbered series, but for numbered series we receive the first volume only, and slips thereafter.

The basic thing to remember is that with only the most trivial exceptions, if a book is published by any of the publishers in our plan, you will see either the book or a slip. Be aware that if any one parameter calls for a slip to be sent, we will receive only the slip and not the book. See me if you need to consult the detailed profile. Also please bear in mind that if a patron specifically wants a book that appears to be in scope, you can ask Eleanor Garrison to "claim don't dup" against your fund code and to attach a notify for the patron.

PUBLIC SERVICES AND COLLECTION DEVELOPMENT ADMINISTRATIVE PERSONNEL

September 1992		Phone #	Room #
HEAD OF ACCESS SERVICES	ROBERT PILLOW	19217	CIRC
HEAD OF REFERENCE SERVICES	LINDA RICHARDSON	15069	204
HEAD OF SPECIAL COLLECTIONS	LAURA KATZ SMITH	19215	SPEC COLL
PRINCIPAL BIBLIOGRAPHER [Head of Collection Development]	PAUL METZ	15663	5010
HEAD OF SCIENCE REFERENCE SERVICES	FLORA COBB	19285	4010
HEAD OF VIRGINIA TECH INFORMATION CENTER	JOHN COSGRIFF	15589	430B

DIRECTORY OF SUBJECT REFERENCE LIBRARIANS

Subject	Librarian	Phone #	Room #
ACCOUNTING	JOHN TOMBARGE	17994	201a
ADMINISTRATION & EDUCATIONAL SERVICES	JOHN TOMBARGE	17994	201a
AEROSPACE & OCEAN ENGINEERING	EVELYN GRAYBEAL	16354	4030
AGRICULTURAL ECONOMICS	LINDA RICHARDSON	19224	204
AGRICULTURAL ENGINEERING	BILL KOWNACKI	19237	302
AGRONOMY	FLORA COBB	19285	4010
AMERICAN LITERATURE	C. W. HANEY	14126	302
ANAEROBIC MICROBIOLOGY	VICKI KOK	16610	VET MED
ANIMAL SCIENCE	FLORA COBB	19285	4010
ANTHROPOLOGY/ARCHAEOLOGY	BRUCE OBENHAUS	16181	Microf.
APPALACHIAN STUDIES	ROGER STELK	14118	3030
ARCHITECTURE	ANNETTE BURR	19272	COWGILL
ART	ANNETTE BURR	19272	COWGILL
BIOCHEMISTRY & NUTRITION	BETH HANSON	19246	VTIC
BIOLOGY	PAT MURPHY	19248	4030
BOTANY	PAT MURPHY	19248	4030
BUILDING CONSTRUCTION	ANNETTE BURR	19272	COWGILL
BUSINESS ADMINISTRATION	LANE RASMUSSEN	14645	2030
BUSINESS LAW	LANE RASMUSSEN	14645	2030
CHEMICAL ENGINEERING	EVELYN GRAYBEAL	16354	4030
CHEMISTRY	FLORA COBB	19285	4010
CHILDREN'S LITERATURE	DON KENNEY	19258	Dir. Suite

etc.

LIBRARIANS' ACADEMIC DEPARTMENTAL ASSIGNMENTS
revised 9/92

HUMANITIES SUBJECTS	**Phone nos.**
Appalachian Studies - Roger Stelk Jean Speer - Communications Department 20 Agnew Hall 0227 x 7942	14118
Architecture - Annette Burr Humberto Rodriquez, Walter Butke 201 Cowgill Hall 0205 x 5324	19272
Art and Art History - Annette Burr Thomas Carpenter Humanities 0227 X 8416	19272
Building Construction - Annette Burr Vincent Cilimberg Building Construction 0156 x 9877	19272
Communications Studies - Joanne Eustis Ed Sewell 17 Agnew Hall 0311 x 9826	15595
English - Charles W. Haney Hilbert Campbell 217 Williams Hall 0112 x 7785	14126
Foreign Languages - Anita I. Haney French-W. Pierre Jacoebee 330 Femoyer Hall 0225 x 5233 German-Philip A. Mellen 232 Femoyer 0225 x 7646 Spanish-Justo C. Ulloa 231 Femoyer 0225 x 5211	14116
History - Roger Stelk Jere Link 523 McBryde Hall 0117 x 8373	14118

etc.

FUND CODE AUTHORIZATION/COLLECTION DEVELOPMENT RESPONSIBILITIES

September 1992

ACCT, ACC	(Accounting)	Tombarge
AGEC, AGE	(Agricultural economics)	Richardson
AGP	(Agriculture: Plant Sciences)	Cobb
AGR	(Agriculture: Animal Science)	Cobb
ARCH, ARC	(Architecture)	Burr
ART	(Art)	Burr
BAD	(Business Administration: Finance, Management, Management Science, Marketing)	Rasmussen
BIOL, BIO	(Biology)	Murphy
BION, BN	(Biochemistry & Nutrition)	Hanson
BOT	(Botany)	Murphy
CHEM, CHM	(Chemistry)	Cobb
COM	(Communications)	Eustis
CONT	(Contingency)	Metz
CS	(Computer Science)	Lener
CTRA, CTR	(Clothing/Textiles)	Gray
ECON, ECN	(Economics)	Richardson
ED	(Education)	Tombarge
EGI1-5	(Engineering, group B: Chemical, Materials Engineering)	Graybeal
ENGI,EGI2-5	(Engineering, group B: Electrical, Industrial, Operations Research)	Kownacki
ENG, ENG	(English)	C. W. Haney
ENGR, EGR2-5	(Engineering, group A: Aerospace & Ocean, Civil, Engr.Science & Mechanics, Mechanical, Mining and Minerals)	Graybeal
EGR1-5	(Agricultural, Engr. Fundamentals)	Kownacki, Kenney
FCD	(Family & Child Development)	Richardson
FISH, FIS	(Fisheries & Wildlife)	Murphy
FOR	(Forestry)	Kownacki
FORL,FRL1-5	(Foreign Languages: French, German, Spanish, Portugese)	A.I. Haney
GAPS	(Replacements by Acquisitions)	Cramer-Pratt
GAPB	(Replacements by Binding)	Cramer-Bowden
GENR, GEN	(General Reference)	A. I. Haney
GEOG, GEO	(Geography)	Obenhaus
GEOL, GL	(Geology)	Lener

etc.

CALL NUMBER CATEGORIES FOR COLLECTION DEVELOPMENT RESPONSIBILITIES

A (all)	(All)
B-BD, BH	A. Haney
BF	Richardson
BJ-BX	A. Haney
C (all)	Stelk, Obenhaus
D-F	Stelk
G-GT	Obenhaus, Gray
GV	Stelk
H (only)	Obenhaus
HA	Obenhaus, Rasmussen, Richardson
HB-HC	Richardson
HD-HJ	Rasmussen, Tombarge, Richardson
HM-HX	Metz, Richardson (HQ1-1099)
J (all)	Beagle
K (all)	Spahr, Rasmussen
L (all)	Tombarge
M (all)	Eustis
N (all)	Burr, Gray
Ps (other than below)	Eustis, A.I. Haney, Baer
PC	A.I. Haney
PE	C.W. Haney
PF	A.I. Haney
PG	Baer
PN	Eustis
PQ	A. I. Haney
PR	C. W. Haney
PS	C. W. Haney
PT	A. I. Haney
PZ	Kenney, C.W. Haney
Q (only)	Cobb, A.I. Haney, Lener
QA	Cramer, Lener (QA74-77), Metz (QA276)
QB	Kownacki
QC	Kownacki
QD	Cobb, Hanson
QE	Lener
QH	Murphy
QK	Murphy
QL	Murphy

September 1992

QM	Murphy
QP	Murphy, Kok, Hanson
QR	Murphy, Kok, Hanson
R (all)	Kok, Hanson, Graybeal, Richardson, Kownacki
S (only)	Cobb, Kownacki
SB	Cobb, Burr
SD	Kownacki
SF (other than below)	Cobb, Kok
SF 600-1100	Kok
SH	Murphy
SK	Murphy
T (only)	Kownacki, Graybeal, Kenney
TA-TC	Graybeal
TD	Graybeal, Burr
TE-TG	Graybeal
TH	Graybeal, Burr
TJ	Graybeal
TK	Kownacki
TL	Graybeal
TN	Graybeal
TP	Graybeal, Hanson, Burr
TR	Eustis, Burr
TS	Kownacki, Graybeal, Hanson
TT	Gray, Burr
TX	Hanson, Tombarge
U-V (all)	Pillow, Graybeal, Stelk
Z 1-549	(All)
Z 662-1020	Ashley
Z 1001-8999	(All)

NOTE:	Q-T	A. I. Haney, for Study of Science in Society

Minutes
University Libraries
Collection Development Meeting
March 9, 1993

1. Announcements

Evelyn Graybeal announced that all fiche, all CD's, and all hardware except for one printer that was ordered on the standards collection are now here.

Linda Richardson reminded everyone about the Humanities-Social Science Reference Department's open houses, scheduled for 1:30-3:00 this Thursday and 10:00-11:30 Friday. Send a note to "sharonk" on VTVM1 to enroll.

Joanne has appointed a task force to write specifications for purchasing an acquisitions system. This we will do, this year.

An ad hoc group consisting of Vicki Kok, Beth Hanson, Pat Murphy, Flora Cobb, Evelyn Graybeal, and Richard Sapon-White will work with Paul to study criteria, procedures, and a means of soliciting faculty input in response to a request from Veterinary Medicine that a number of journals in medicine be relocated from Newman to their facility.

The final roster of call numbers to be used in measuring circulation has been sent to Melissa Obenhaus.

The deadline for the Searcher position is this Friday. We hope to get somebody good, soon. In the meantime, it's still wise to check with your searcher about the size of your personal backlog.

Bob Pillow was not present, but sent Paul some information in response to questions about the storage building, about our reporting of ILL statistics and titles, and about our use of document delivery services. See attachment for Bob's statement. The last of these issues will be an agenda item for our next meeting.

2. Annual Meetings with Department Heads

The Provost strongly endorses annual meetings between subject bibliographers and the heads of the departments for which they are responsible. He will encourage this. The University Librarian is tentatively scheduled to begin to meet regularly with the Deans this fall, and this should provide a useful opportunity to enlist the Deans' support. The Library materials budget is about one percent of total univer-

sity spending, and an annual meeting to apprise heads about our spending and to solicit their priorities or plans for new programs is only reasonable. Many bibliographers will naturally want to include library reps in these meetings.

3. Black Box: Tracking Continuations Requests

Through no one's fault but Paul's, we have fallen into inconsistent practices re tracking new serial requests. So we discussed it and decided:

*The black box is will no longer be used for new serial requests

*Keep your own new serial requests. Paul will convene the subject teams for spring and fall reviews.

*There will be no further effort to keep track of serials not approved but "carried" for further deliberation. If a serial is not approved, the burden is on the bibliographer to bring it up again in the next review if he/she wants to advocate it again.

4. Downlinking Instructional Lectures, Other Video

It is possible for us to pay site licenses allowing us to decode and tape ("downlink") satellite-broadcast lectures and other instructional materials. We need an ORF, as with all other orders. Bibliographers should see Virginia Chapman for technical advice and/or Eleanor Garrison re how best to prepare the order.

That we may do this does not mean we must. Any expensive video represents a significant number of books not ordered. Use your judgment. So far we are probably ahead of the game, in that we have built strong video collections and remained a player with emerging technologies, but if requests for downlinking and other videos continue to grow, the University will have to study the policy implications of various units' shifting the costs of their instructional responsibilities onto the Library. Unfortunately this has already been studied, pre-emptively but not productively, but the University Librarian can bring it up again when she feels the time is right.

Next Meeting: Tuesday, April 13, 9:00 in the Board Room

Minutes
University Libraries
Collection Development Meeting
April 13, 1993

1. Announcements

Welcome Debbie McAlexander, new Pre-Order Searcher!!!

Bob Pillow was to have summarized our use of document delivery services, but was called for a meeting of the Storage Building Task Force. He will give his summary next month.

Dave Beagle shared his perspective on the events leading up to Lexis' cancellation of our services. We felt we were on safe grounds, as we had instituted a registration procedure and did make registrants promise to confine their use to educational purposes. Ambiguities between what is meant and what is understood in the terms "educational" and "instructional" may help to account for what happened.

Jan will recommend the number of Westlaw accounts we should get. Other products, including expanded use of CIP, a possible Patents CD-ROM, and expanded use of Dow-Jones, will also be considered. Dave is going to ask the LEXNEX listserv to describe the ways in which they used Lexis, and this should guide us in the search for alternatives. We recognize that not all Lexis services can be replaced.

Paul announced that we were the successful bidder for a two-volume 1803 elephant folio, "A Collection of Prints from Pictures for the Purpose of Illustrating The Dramatic Works of Shakespeare," which should be useful for instruction in English, art, and theater.

The task force studying the acquisition of cataloging copy for our major microforms sets has recommended that we start with the Library of American Civilization. Thanks to Bruce, Anita, and Janet Dodd for their help. We will continue with other sets once these records have been obtained and integrated into our OPAC.

We decided not to convert from paper journal to cards for Choice.

The default price for books not returned by patrons, and not found in Books in Print, is $50. Bibliographers ordering a book whose price is not known can use this price, but are free to use a different figure if appropriate. Previous attempts to mandate a standard default, e.g. $33, will not continue.

2. Searchers

Debbie Mac will do most of science, with the likely exceptions of mathematics and veterinary medicine. Sue will continue with most of humanities, minus history and perhaps another field. Pat and Yvonne will share social science, with these additions. The final configuration isn't set yet; for now, continue to send orders as before. In any event, we will continue to "load level" by helping out in a jam, as Sue has recently helped with science orders.

Pat Caldwell made a few requests:

* If possible, please sign orders in upper right
* Please don't send rushes in same mail as other orders
* If sending OCLC printout, please write in price info if you have it

3. Pricing Data

Paul shared some Consumer's Price Index information that Gene Weimers presented at a conference. The data show the dramatic increase in the cost of library materials. Library materials have risen about as fast as medical care or automobile insurance. Unfortunately, so has college tuition, which is why college administrators feel so hemmed in their efforts to find funds to offset materials inflation.

At research institutions, library funding as a proportion of overall budget has dropped in recent years. Library materials have remained about 35% of library budgets, but nearly all institutions have seen a shift from monographs to serials within that 35%.

4. Collection Development Policies

As part of our outreach efforts with the academic departments this year, we'll rewrite the collection development policies. They are badly dated.

5. New Serials

We will continue to review new serials twice a year, but title splits, formerly free titles, and reference-related serials or CD's should be brought to Paul as they emerge. Just use your judgment. Remember that reference-related electronic resources may require special, department-specific approval. It's up to reference librarians or their depart-

ments to take the initiative on reference-related electronic products.

Next Meeting: Tuesday, May 11, 9:00 in the Board Room

Minutes
University Libraries
Collection Development Meeting
May 11, 1993

1. Announcements

Welcome Stephen Zietz, Head of Special Collections!

Linda Richardson asked that comments about the Education candidates by sent to her asap, and comments about the VP candidates by the end of May.

Bob Pillow is out, but will report on ILL and document delivery next month.

A batch job reporting books with long hold/recall queues is about ready. Expect to receive it monthly, beginning soon. We will probably report all books with three or more holds or recalls.

Science is going to weed 150 books/week from fourth and fifth floors this summer. Significant weeding will also take place in Art and Architecture, though many of their books will have to be boxed for later processing.

Paul will be meeting with the Radford director to discuss ideas for retrospective collection development at Radford. May refer her to individual bibliographers for subject-specific expertise.

We've made a $100,000 SOLINET prepayment and have prepaid $150,000 of Faxon bills, with more to come, out of the materials budget.

Linda, Paul, Vicki Burnett, Alan, Flora, and Michael are serving on a task force working on procedures for review of contractual agreements and site licenses. We will probably recommend a standing body to review agreements and changes in agreements. Dave reminded us that Bob Summercrest chairs a university committee on task forces.

Anita reported on the Latin American Studies program. It has not passed all levels of approval yet. We'll receive a copy of the recommendations if it does. Effect on our collections will be less dramatic than originally feared, with an undergraduate minor the main emphasis and reliance on English-language materials at least as much as Spanish.

2. Lexis

Paul summarized Kay Heidbreder's memo explaining what happened with Lexis. We were not in outright breach of what Lexis admitted was a sloppy and ambiguous contract. Nonetheless, either party was free to walk away from the relationship, and Lexis did so on the grounds of cost.

We are exploring a number of ways to replace Lexis services, especially through patents CD-ROM, more use of CIP, Medline, and additional Westlaw accounts. These will help, but will not replace all Lexis services. We will probably approach Lexis in six months and suggest restored service at a dramatically reduced and controlled level.

3. Outreach and Collection Development Policies

Paul summarized the steps we will be taking in fall outreach, including meetings between bibliographers and department heads, attendance at fall faculty meetings, and mailings of general and specialized handouts. We will rewrite our collection development policies in conjunction with this campaign.

Please look over the format of the current collection development policies and send Paul any comments or suggestions. Paul will appoint a group to work with him on format specifications this summer.

4. Miscellaneous

There was general discussion of the possibility of lost records in VTLS, or records whose relationship to bar-coded items was lost as a results of VTLS '92. Lowell will try to define the extent of the problem and report back.

There was also brief discussion of the possibility of reversing the 1992 cancellation of the subscription for microform copies of dissertations. Public Services department heads will discuss this possibility again in June.

Next Meeting: Tuesday, June 8, 9:00 in the Board Room